

# RESEARCH ON OPEN EDUCATIONAL RESOURCES FOR DEVELOPMENT (ROER4D) IN THE GLOBAL SOUTH: LEARNING TO RESEARCH OER OPENLY

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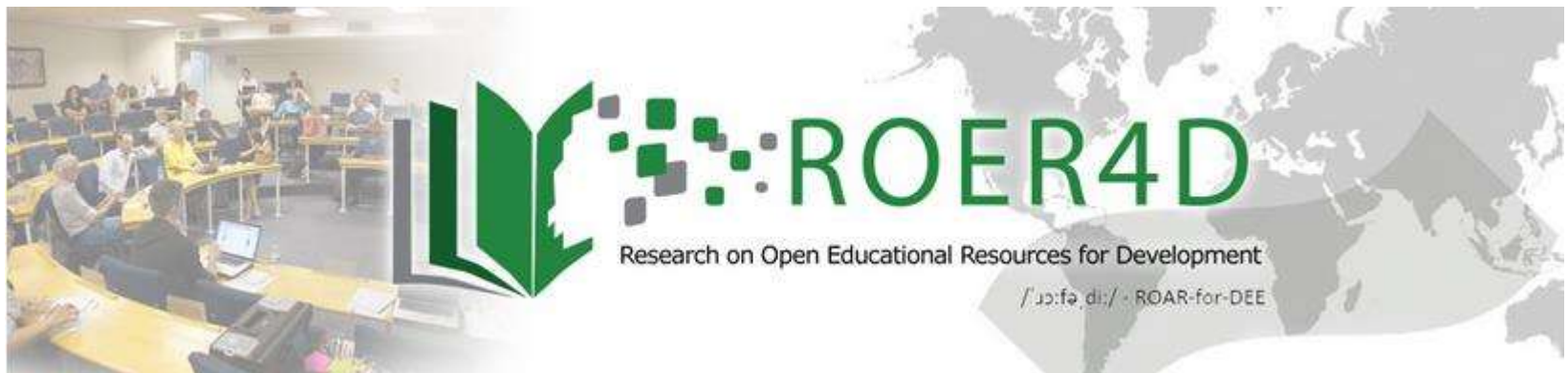
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*IDRC Grant/ Subvention du CRDI: 107311-001-Research into Open Educational Resources for Development*



# Research on Open Educational Resources for Development (ROER4D) in the Global South: *Learning to research OER openly*

Cheryl Hodgkinson-Williams with the ROER4D team

OpenEd 2014, Washington, DC.

19-21 November 2014



# Key challenges facing education in developing countries

Education institutions under  
**political & financial pressure**

**Rising numbers of students** in  
the education sector

**Expensive, limited in number,**  
often **outdated** textbooks are  
**not entirely relevant** to the  
context

**Reduction of educational  
funding** by governments

**Employability of graduates**



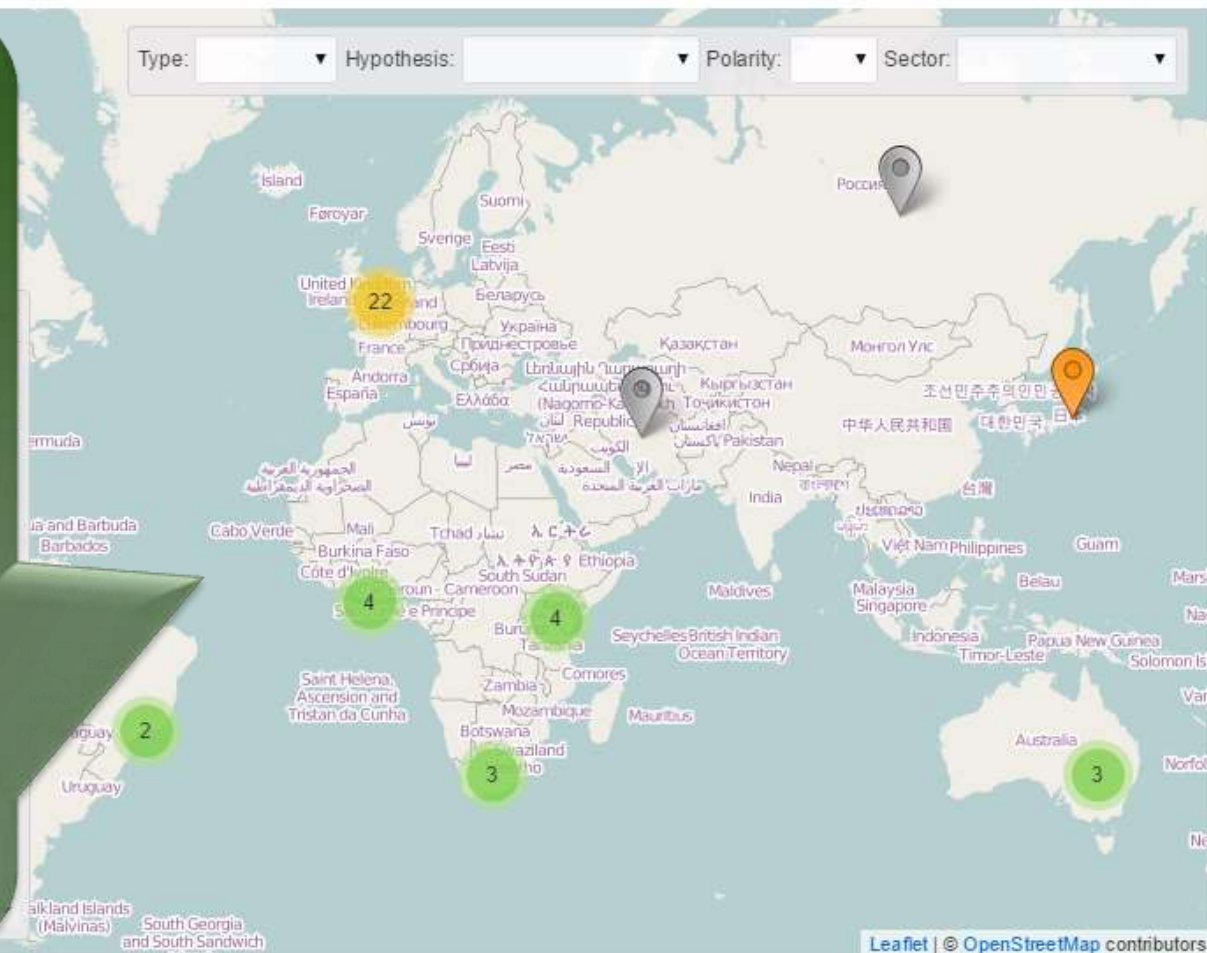
[http://commons.wikimedia.org/wiki/File:%3APCoE\\_students\\_at\\_AICTE\\_Regional\\_Office\\_in\\_Mumbai.jpg](http://commons.wikimedia.org/wiki/File:%3APCoE_students_at_AICTE_Regional_Office_in_Mumbai.jpg)

# Dearth of OER Evidence in the Global South

Claims made about the potential of OER to address key challenges in **developing countries** to:

- increase **access** to higher education
- contain or **reduce costs**
- enhance **quality**, currency & relevance

BUT, most of the research on OER adoption and impact has been undertaken in the “Global North”



<http://oermap.org/oer-evidence-map/#>

# More robust OER research is required

- Recent critiques of OER (Knox 2013a, 2013b) suggest that **more robust OER research is required** to move beyond celebratory rhetoric
- A **stronger evidence base on OER** would allow governments in the Global South to move to evidence-based educational policies





# ROER4D Funding

International Development Research Centre (IDRC)  
Open Society Foundation (OSF)  
UK Department for International Development (DFID)

IDRC

OSF

DFID

3 year project (27 Aug 2013 - 27 Aug 2016  
with an extension to Feb 2017)

Grant 1 - IDRC CAD 2 million & OSF

Grant 2 - DFID CAD 500,000

3 Regions

- South America
- Sub-Saharan Africa
- South & South-East Asia

11 OER Adoption studies & 8 OER Impact  
studies (details early 2015) in 7 clusters



In what ways, and under what circumstances, can the adoption of OER impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?

Global South

# Research on Open Educational Resources for Development (ROER4D)

In what ways, and under what circumstances, can the adoption of OER impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?

1. In what ways, and under what circumstances are OER being adopted in the Global South?





# Research on Open Educational Resources for Development (ROER4D)

In what ways, and under what circumstances, can the adoption of OER impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?

1. In what ways, and under what circumstances are OER being adopted in the Global South?

2. In what ways, and under what circumstances can OER adoption impact upon the increasing demand for accessible, relevant, high-quality, and affordable education in the Global South?



# Project proposal timeline

## 1<sup>st</sup> Call

- Jul 2012: Proposals solicited by Planning Group which met in Thailand in May 2012
- Oct 2012: Proposals submitted and evaluated by the Planning Group
- Jan 2013: Proposers invited to present at F-2-F meeting in Jakarta, Indonesia

## Proposal process

- Jan 2013: Final proposals put forward to Planning Group
- Feb 2013: A proposal put forward to OSF for one project
- May 2013: Submitted proposal to IDRC

## Grant 1

- Aug 2013: IDRC awarded grant with additional funding from OSF



## Grant 2

- Jan 2014: Additional proposal submitted to IDRC for OER impact studies
- Apr 2014: IDRC awarded additional funds from DFID for impact studies



## 2<sup>nd</sup> Call

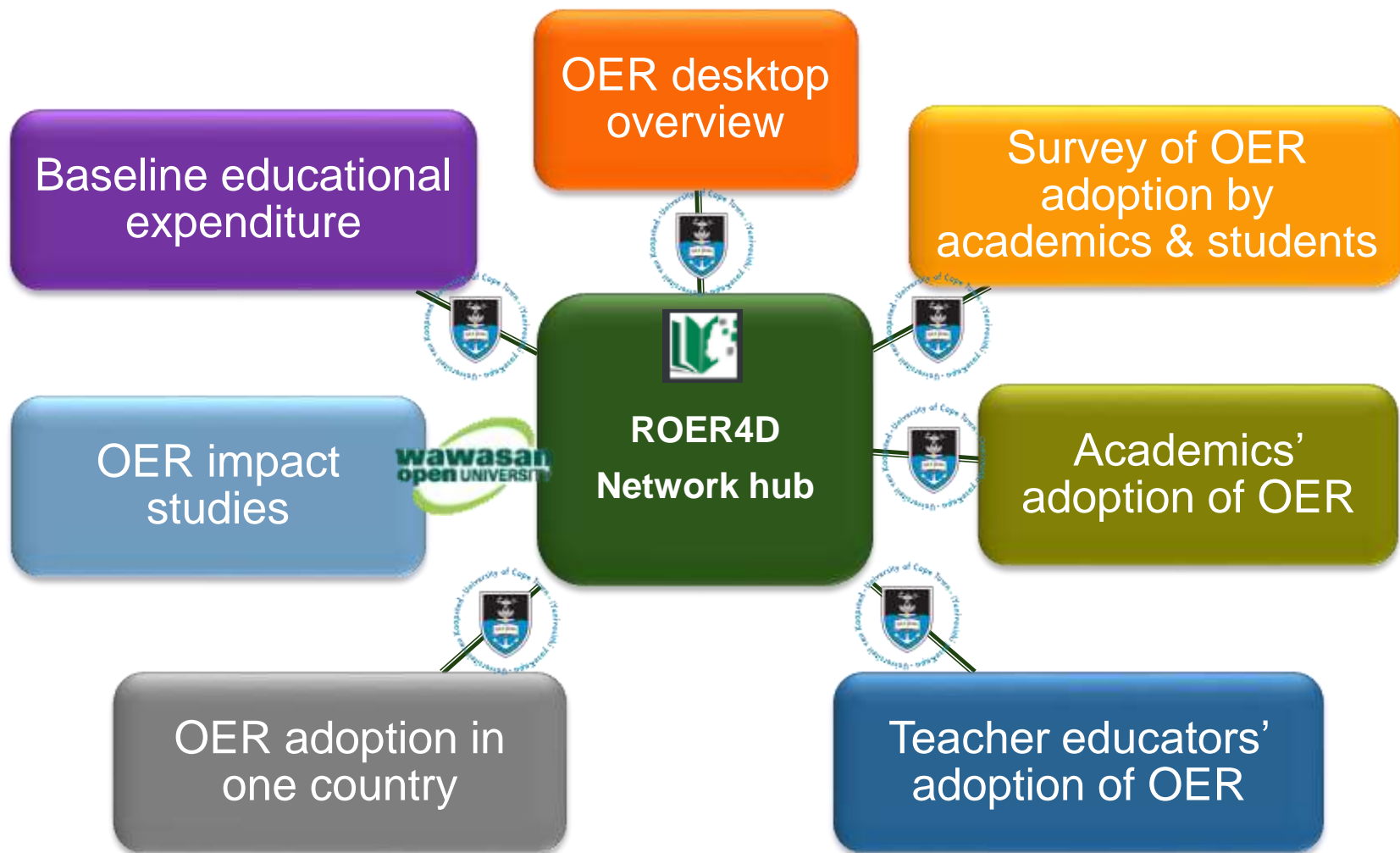
- Aug 2014: Open call for proposals for OER impact studies

## Proposal process

- Sep-Oct 2014: Proposals submitted and evaluated by panel of jurors
- Dec 2014: Shortlisted proposers invited to present at F-2-F workshop in Penang, Malaysia



# Overview of ROER4D's 7 Project Clusters



# ROER4D Map 1: OER Adoption studies

question harmonization

RESEARCH CAPACITY

open data

## Research on Open Educational Resources for Development in the Global South

### GENERAL OBJECTIVE:

IMPROVE EDUCATIONAL POLICY, PRACTICE and RESEARCH in developing countries  
by better understanding the use and impact of OER.

August 2013 - February 2017

EVALUATION

COMMUNICATION



PROJECT CLUSTERS



[www.roer4d.org](http://www.roer4d.org)

NETWORKING

# ROER4D Objectives

**1. Build an empirical knowledge base**  
on the use and impact of OER in education



**Research capacity**

**2. Develop the research capacity of OER researchers**

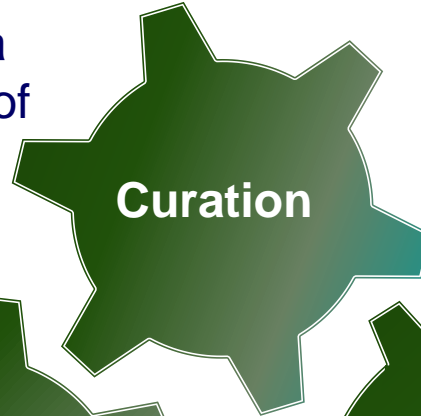


**3. Build a network of OER scholars**

**Networking**



**Curation**



**4. Curate research openly**

**Communication**



**5. Communicate research to inform education policy and practice**



IDRC



CRDI



ROER4D  
Research on Open Educational Resources for Development





# ROER4D: Degrees of openness

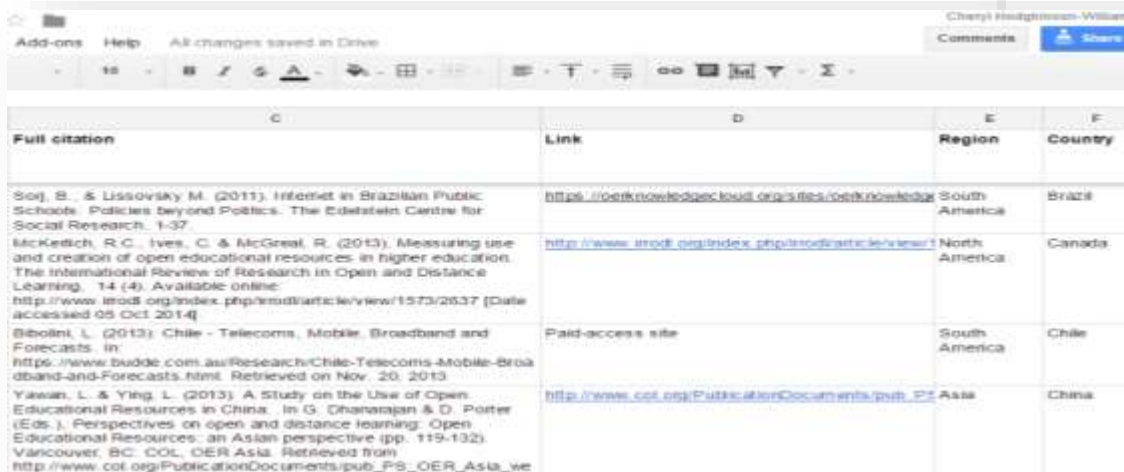


Project Management team, lawyers, funders	Network team (PI, Deputy PI, PM, communication consultant, etc.)	Network team and all ROER4D researchers	Anyone
<ul style="list-style-type: none"><li>• Contracts</li><li>• Finances</li></ul>	<ul style="list-style-type: none"><li>• Minutes of meetings</li></ul>	<ul style="list-style-type: none"><li>• Sub-Project reports</li></ul>	<ul style="list-style-type: none"><li>• Proposals</li><li>• Reference lists</li></ul>

# ROER4D Knowledge building in “the open”

## Strategies – some open, some closed

1. **Sharing Open Access literature and/or reference list** of literature available openly (e.g. OER Knowledge Cloud) or behind password protected databases in three key ways:
  1. Reference list in a Google spreadsheet open publicly and with comment rights
  2. Mendeley private groups (in a few Sub-Projects, limited to 3); Mendeley in an open group for references only
  3. Links to the IDRC databases
2. **Sharing draft versions** of literature reviews, research reports in Google Drive with comment rights



C	D	E	F
Full citation	Link	Region	Country
Soij, B., & Lisovsky M. (2011). Internet in Brazilian Public Schools: Policies beyond Politics. The Edelstein Centre for Social Research. 1-37.	<a href="https://oerknowledgecloud.org/sites/oerknowledgecloud.org/files/2011-10/Soij%20et%20al.%202011.pdf">https://oerknowledgecloud.org/sites/oerknowledgecloud.org/files/2011-10/Soij%20et%20al.%202011.pdf</a>	South America	Brazil
McKerlich, R.C., Ives, C. & McGreal, R. (2013). Measuring use and creation of open educational resources in higher education. The International Review of Research in Open and Distance Learning, 14 (4). Available online: <a href="http://www.irrodl.org/index.php/irrodl/article/view/1573/2637">http://www.irrodl.org/index.php/irrodl/article/view/1573/2637</a> [Date accessed 05 Oct 2014]	<a href="http://www.irrodl.org/index.php/irrodl/article/view/1573/2637">http://www.irrodl.org/index.php/irrodl/article/view/1573/2637</a>	North America	Canada
Bibolini, L. (2013). Chile - Telecoms, Mobile, Broadband and Forecasts. In <a href="https://www.budde.com.au/Research/Chile-Telecoms-Mobile-Broadband-and-Forecasts.html">https://www.budde.com.au/Research/Chile-Telecoms-Mobile-Broadband-and-Forecasts.html</a> . Retrieved on Nov. 20, 2013	Paid-access site	South America	Chile
Yawan, L. & Ying, L. (2013). A Study on the Use of Open Educational Resources in China. In G. Dhanarajan & D. Porter (Eds.), Perspectives on open and distance learning: Open Educational Resources: an Asian perspective (pp. 119-132). Vancouver, BC: COL, OER Asia. Retrieved from <a href="http://www.col.org/PublicationDocuments/pub_FS_OER_Asia_w">http://www.col.org/PublicationDocuments/pub_FS_OER_Asia_w</a>	<a href="http://www.col.org/PublicationDocuments/pub_FS_OER_Asia_w">http://www.col.org/PublicationDocuments/pub_FS_OER_Asia_w</a>	Asia	China

AN OVERVIEW OF OPEN EDUCATIONAL RESOURCES  
POLICIES AND PRACTICES IN THE SOUTH AND SOUTH EAST  
ASIAN REGIONS  
G. Dhanarajan  
Wawasan Open University  
Penang, Malaysia

responds to the brief given by ROER4D to review the socio, economic, and legal environments around Open Educational Resources [OER] on the Internet. Interest in Open Educational Resources [OER], in many parts of Asia, to confront educational challenges, began to attract the attention of many and scholars of education, especially those engaged in higher education, during the middle of the last last decade. Those in Far East Asia (S. Korea, Taiwan) attracted by the buzz created by MIT's *Open Course Ware [OCW]*, the early enthusiasts. These early adopters, much influenced, further, by

# ROER4D Knowledge building in “the open”

## Benefits of being “open”

- ✓ Sharing resources and/or references that might otherwise have been missed – especially those in languages other than English (Mutuality)
- ✓ Interrogating Google spreadsheet of references like a set of data (Enquiry, Utility)
- ✓ Crowd-sourcing references in Mendeley
- ✓ Surfacing contradictions in the literature where authors publish about OER in “closed” journals, and highlighting the extent to which access to information is for those who can pay and the disadvantage this is for those in the Global South (Scrutiny, Critique)
- ✓ Sharing draft versions of literature reviews, our research reports provides early alerts to new resources and suggestions for improvement (Adaptability)

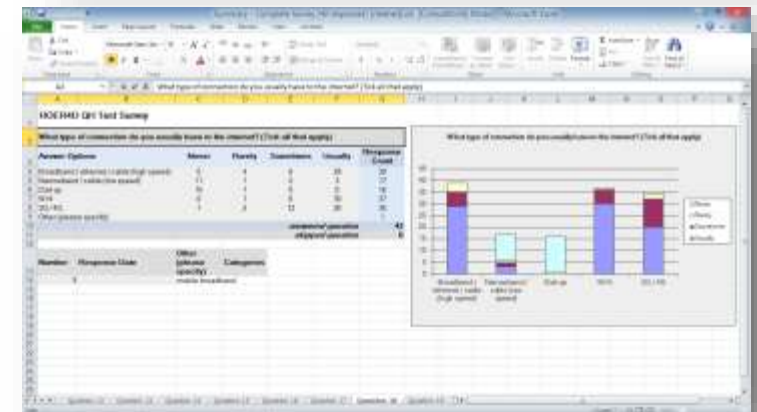
## Challenges to being “open”

- ✗ Not everyone is comfortable creating or adding to collaborative documents and “working in the open” (Anxiety, Suspicion)
- ✗ Need to be mindful of sharing resources that are openly licensed and not inadvertently sharing copyrighted materials (Liability)
- ✗ Need to be careful not to unintentionally “expose” individual researchers and/or sub-projects in the process of sharing draft versions of literature reviews, research reports and presentations (Vulnerability)
- ✗ Need to be cognizant of limitations of various software and cloud-based services, as well as our own lack of knowledge and skills regarding them (Unfamiliarity)

# ROER4D Research capacity building in “the open”

## Strategies – some open, most closed

1. Consulted 9 major OER surveys to develop a **bank of potential** questions in a cloud-based spreadsheet made public with comment rights
2. Discussed question options, **chose the best and recorded rationale** for decision in a cloud-based document made public with comment rights
3. Shared Qs with researchers, showing how they would appear via an online **survey site**
4. Engaged with researchers online via **webinars to harmonise questions**
5. Continued discussion **off-line via discussion** on Sakai-based forum and/or email
6. **Piloted survey** based on harmonised questions with ROER4D members and other OER colleagues (version 1)
7. **Assessed results and fed results** of pilot survey back to network
8. **Revised** the questions and shared them with network (version 2)
9. Had **researchers present their adaptations** of the survey for their specific sub-projects via webinars



# ROER4D Research capacity building in “the open”

## Benefits of being “open”

- ✓ Making explicit and linkable the other surveys that we consulted  
(Transparency)
- ✓ Making the underpinning hypotheses of our questions clear so that they could be interrogated during collaborative webinars  
(Accountability)
- ✓ Developing a better understanding of potential language and/or cultural interpretations (Cultural sensitivity)
- ✓ Creating deeper network bonds through this shared process  
(Community)

## Challenges to being “open”

- ✗ May unwittingly expose participants' lack of research knowledge and hinder, rather than help, the capacity building process (Vulnerability)
- ✗ Can take much longer because of the intentions to collaborate and deliberate ideas (Inefficiency)
- ✗ May result in uneven capacity development if participation is voluntary (Asymmetry)



# ROER4D Building a network of OER scholars in “the open”

## Strategies – most open

1. Attend workshops, webinars, meetings & conferences
2. Find synergies with the other OER research projects (e.g. OER Research Hub)
3. Find mutually supportive activities with the GO-GN OER PhD network
4. Track growth of network since the inception of the ROER4D project
5. Encourage mentors and researchers to participate in social media sites related to the project (e.g. Twitter, Facebook)



# ROER4D Building a network of OER scholars in “the open”

## Benefits of being “open”

- ✓ Finding ways to learn from and/or support other individuals or project teams to further the gathering and analysis of OER adoption and impact (Reciprocity)
- ✓ Optimizing synergies with the other OER research projects (Serendipity)
- ✓ Leveraging the intention of OER scholars to participate in a shared enterprise (Collaboration)

## Challenges to being “open”

- ✗ Understanding that not all researchers, especially those who are new to international research, are comfortable with engaging directly with those who they consider leaders in the field (Timidity, Hierarchy)
- ✗ Ensuring that South-South networks remain as important, if not more than, South-North networks, even if they are less well-established historically (Septentrionalism)

# ROER4D Curating research in “the open”

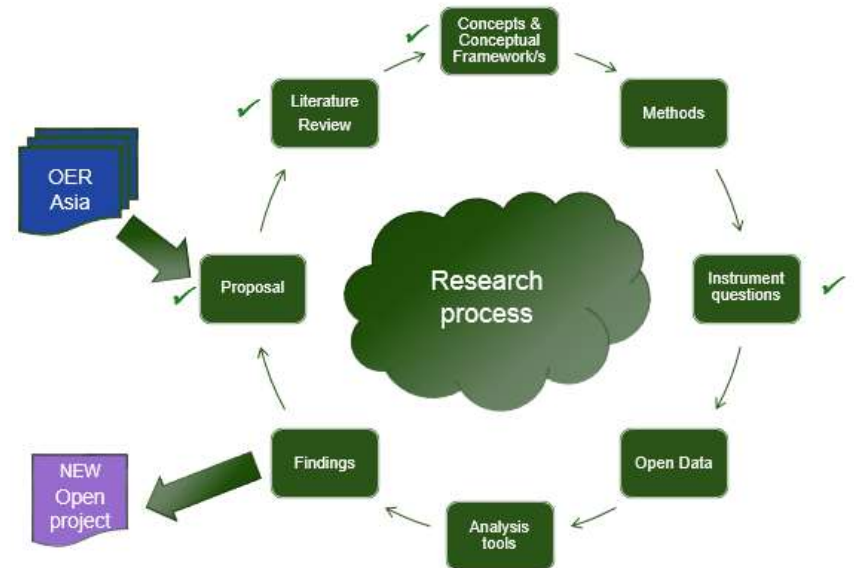
## Strategies – most open, some closed

1) Make as many of the research documents tracking the entire cycle openly available on:

- **Institutional repositories** for long term curation
- **Institutional learning management system** for short and long-term repository of versions of developing documents
- **Open repositories** (FigShare, Zenodo, etc.) for maximum *discoverability*
- **Website and social media** sharing sites for maximum visibility and *discoverability*

2) **Test out the system** regularly to ensure that the ROER4D team, in the first instance, can find the documents

### Open Research: ROER4D intentions to share



# ROER4D Curating research in “the open”

## Benefits of being “open”

- ✓ Open licensing removes need for single place of deposit – multiple platforms can be used to reach the broadest audience (Dissemination)
- ✓ Open formats allow for access by audiences without proprietary software (Accessibility, Adaptability)
- ✓ Open data curation allows for other projects to use ROER4D research in their programmes, or to offer substantive critique while still relevant (Quality)
- ✓ Abundance of third-party platforms that promote open curation through sophisticated metadata functionality (Discoverability)
- ✓ Researchers & other users of documents help check our system and the content (Functionality, Quality)

## Challenges to being “open”

- ✗ Deciding when to be open and when not (Readiness)
- ✗ ... but this means effort must be made to ensure cohesion across platforms (Cost)
- ✗ ... which requires reworking of documents to fit different software systems (Cost)
- ✗ Data needs to be effectively and comprehensively anonymised/made confidential (Complexity)
- ✗ Third-party platforms can potentially be bought by commercial entities and change their terms of service (Instability)

# ROER4D Communicating research in “the open”

## Strategies – open

1. Establish project visibility through website and social media.
2. Share and disseminate project outputs (proposals, presentations).
3. Share process of research through Facebook, Twitter and blogs to build credibility and invite feedback.
4. Maintain presence and schedule regular updates on media channels.
5. Develop a ‘voice’ for project and profiles for researchers.



**ROER4D Website –**  
<http://roer4d.org>



# ROER4D Communicating research in “the open”

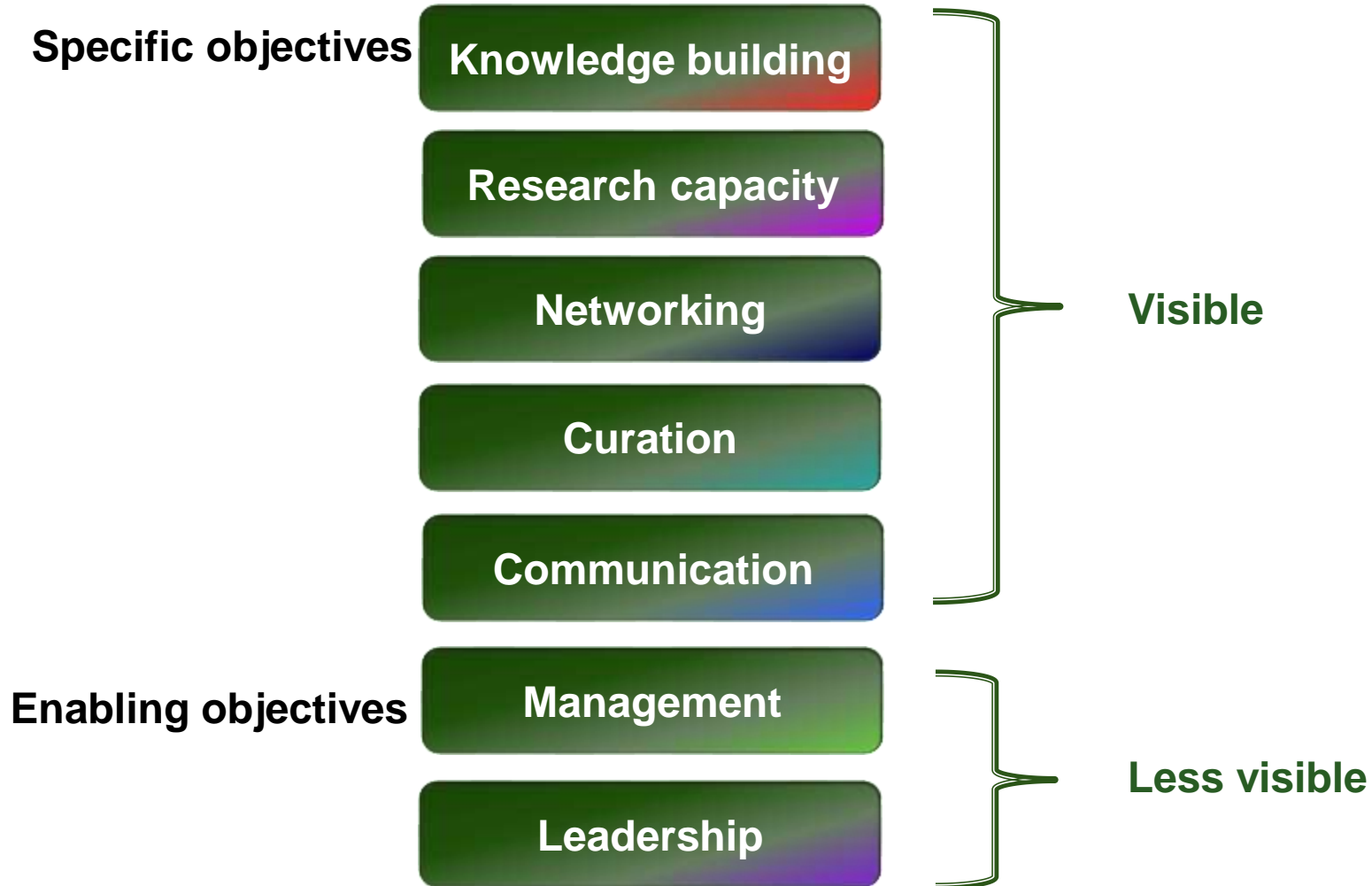
## Benefits of being “open”

- ✓ Early and frequent communication with stakeholders and funders (Credibility, Visibility)
- ✓ Sharing processes and lessons learned within network and outside (Transparency)
- ✓ Find and engage with new audiences (Receptiveness, Dialogue, Interdisciplinarity)
- ✓ Testing and tailoring communications to audiences (Creativity, Adaptability, Agility)

## Challenges to being “open”

- ✗ Deciding when to be open and when not (Readiness)
- ✗ Supporting “failure” and experimentation (Vulnerability)
- ✗ Discomfort in sharing across cultural and geographical contexts (Power differentials, Culture & Norms)
- ✗ Meeting expectations and managing workload (Capacity, Productivity)
- ✗ Danger of accentuating the positive and unbalanced communication (Integrity, Objectivity)

# ROER4D Specific & enabling objectives



# ROER4D Project Management in “the open”

## Strategies – some open, most closed

1. Store all contract and financial documents on password protected **content management system**, but provide access to funders, contracts lawyer, financial manager/s at hosting institutions
2. In a separate content management site provide access to all ROER4D sub-project documents to researchers
3. Document meetings in a closed **Google Doc**, but allow individual team members to contribute



The screenshot displays the ROER4D website. The top navigation bar includes a 'VUB' logo, a 'My Workspace' dropdown menu, and several site-specific dropdowns: 'EDN6015F, 2014', 'EDN4501W, 2014', 'IDRC OER Research', and 'More Sites'. A sidebar on the left contains links to 'Home', 'Resources', 'Project Log', 'Email Archive', 'Participants', 'Search', 'Site Setup', 'Lectures', and 'Help'. The main content area is titled 'IDRC OER Research: Site Information Display' and contains the text 'This is a site for the documents for the IDRC funded OER Research'. Below this is the ROER4D logo, which consists of a green stylized book icon and the text 'ROER4D Research on Open Educational Resources for Development'. The main heading is 'ROER4D Network Meetings', followed by a 'Table of Contents' section listing various dates from August to November 2014, each with a blue hyperlink.

ROER4D Network Meetings

Table of Contents

- [10 November 2014](#)
- [3 November 2014](#)
- [27 October 2014](#)
- [24 October 2014 - Evaluation Planning \(extra meeting\)](#)
- [13 October 2014 - Strategic Planning](#)
- [6 October 2014](#)
- [22 September 2014](#)
- [8 September 2014](#)
- [25 August 2014](#)

# ROER4D Project Management in “the open”

## Benefits of being “open”

- ✓ Making documents easily available to funders, contract lawyers, financial manager/s (Accessibility)
- ✓ Providing digital versions of documentation for each expense line item (Accountability, Transparency)
- ✓ Consuming time in the short term, but paying off in the long term when it comes to reporting (Productivity)
- ✓ Providing necessary background documentation to allow new stakeholders to get up to speed quickly (Continuity)
- ✓ Providing useful lessons learned to new funded projects (Sharing)

## Challenges to being “open”

- ✗ Deciding when to be open and when not (Readiness)
- ✗ Requiring time and effort (Assiduity)

# ROER4D Objectives: Evaluation

**Specific objectives**

**Knowledge building**

**Research capacity**

**Networking**

**Curation**

**Communication**

**Enabling objectives**

**Management**

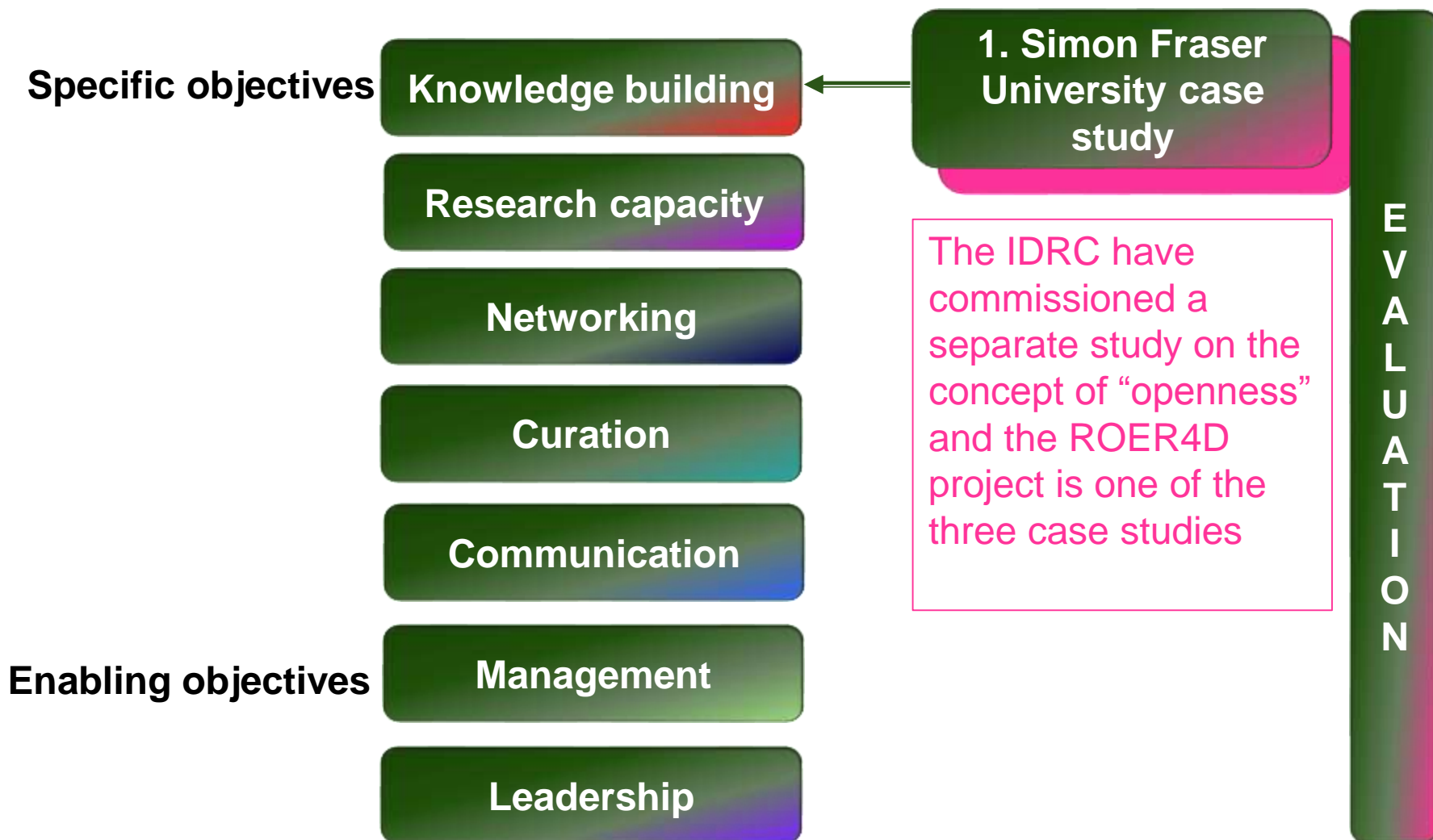
**Leadership**

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# ROER4D Objectives & Evaluation (1)



# ROER4D Objectives & Evaluation (2)

## Specific objectives

Another IDRC project, DECI-2 are both supporting the ROER4D project to develop its Communication & Evaluation strategy & is studying ROER4D as a case study

Knowledge building

Research capacity

Networking

Curation

Communication

## Enabling objectives

Management

Leadership

Simon Fraser University case study

2. DECI-2 case study which mentors the ROER4D Evaluation & Communication consultants

EVALUATION



IDRC



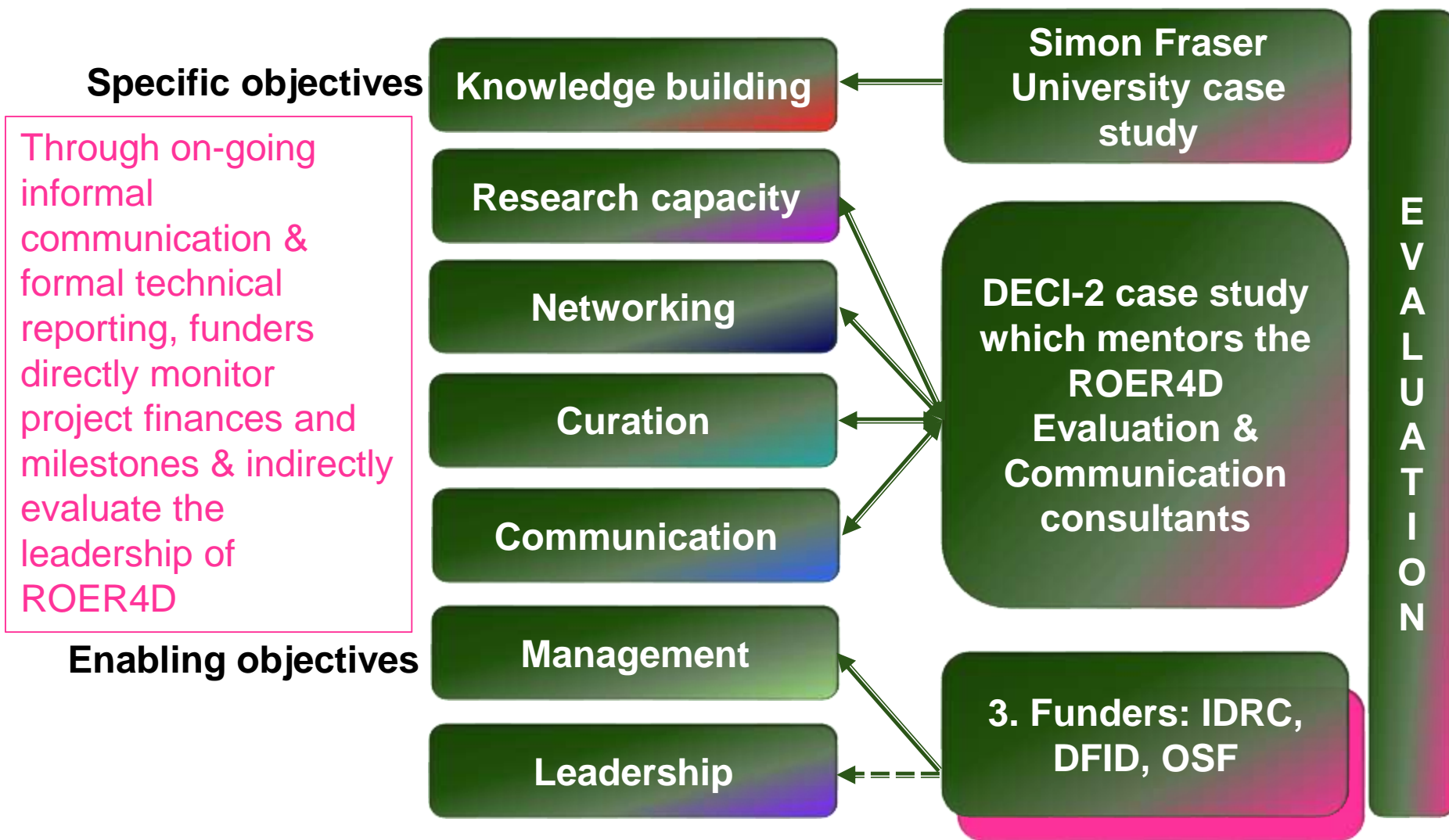
CRDI



ROER4D  
Research on Open Educational Resources for Development



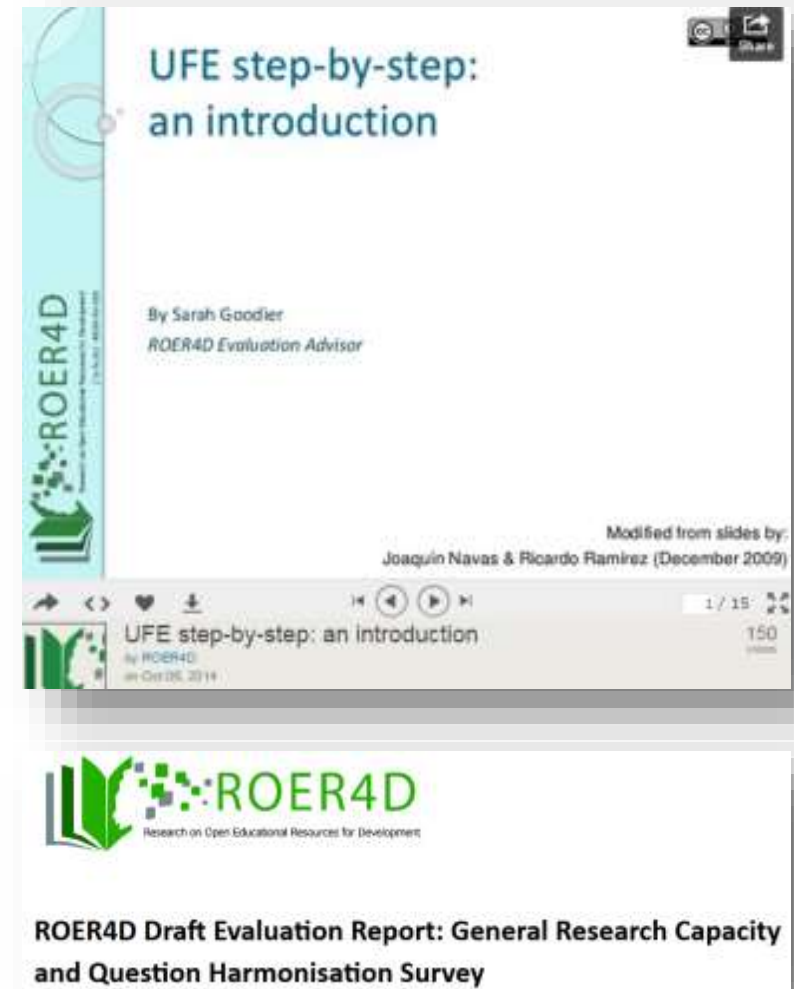
# ROER4D Objectives & Evaluation (3)



# ROER4D Evaluating in “the open”

## Strategies – some open, some closed

1. Understand what is needed in terms of the **scope** of evaluating the ROER4D project – the evaluation work is iterative by nature
2. In collaboration with the ROER4D network hub team, formulate an **evaluation plan** – including what to evaluate and how
  - The experience of the evaluation process and the effect this has is a key component of the evaluation.
3. Get **feedback** from DECI-2 around the evaluation work and incorporate this into the process.
4. Connect with members of the ROER4D, where needed, to conduct surveys, interviews, etc
5. Assess the findings
6. **Share products** of the evaluation work (e.g. slides around process and results, reports, etc.) timeously to allow the findings and recommendations to effect change
7. Be aware of all components of the evaluation work and **collaborate/share** information where possible and where needed



# ROER4D Evaluating research in “the open”

## Benefits of being “open”

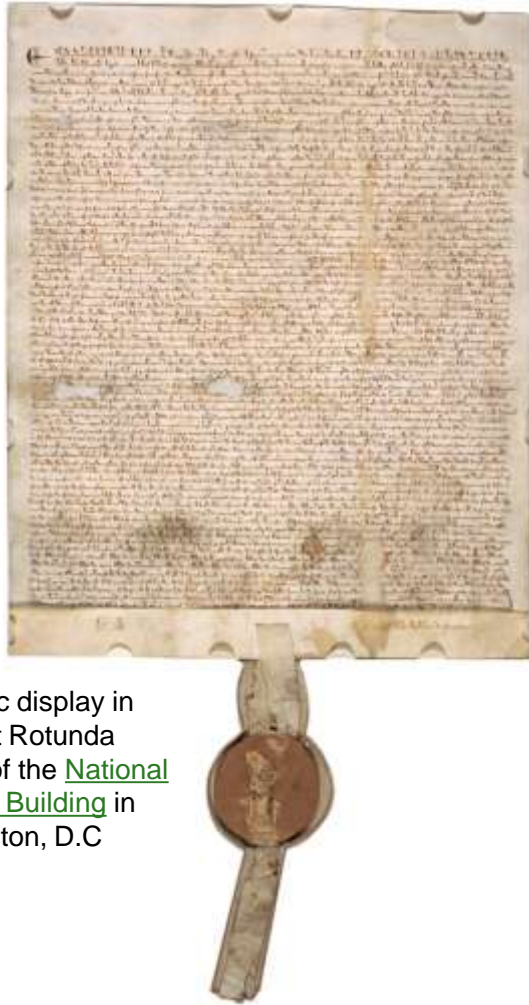
- ✓ The team dynamic in the network hub is very open and inclusive. This bolsters the evaluation work as the team is very willing to share, discuss and reflect on their processes and work (Transparency, Adaptability)
- ✓ As the project evolves, new activities and outcomes related to the priority objectives will provide new windows of insight into the project (Adaptability)
- ✓ Benefit from the other components of the evaluation work being undertaken (Reciprocity)

## Challenges to being “open”

- ✗ Evaluation work, by its nature, cannot always be conducted in the open. Care needs to be employed in the production of the evaluation outputs and making explicit what can and can't be shared openly and at what stage (Vulnerability, Liability)
- ✗ The geographical distance between the hub and many of the sub-projects. Any evaluation work involving sub-project feedback needs to take into account differences in time-zones and language as well as what is possible using the communication technology available (Connectivity)



# ROER4D Open Magna Carta



On public display in  
the West Rotunda  
Gallery of the [National  
Archives Building](#) in  
Washington, D.C

Make open ...  
... if it adds value  
... if it is ethical  
... if it is legal  
... by default



# References

- DECI-2- <http://evaluationandcommunicationinpractice.ca/>
- Knox, J. (2013a). Five critiques of the open educational resources movement. Teaching in Higher Education.
- Knox, J. (2013b). The limitations of access alone: Moving towards open processes in education technology, Open Praxis, 5(1), 21–29.

# Links



**Website:** [www.roer4d.org](http://www.roer4d.org)



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**Presentations:** [www.slideshare.com/roer4D](http://www.slideshare.com/roer4D)

# Thank you!

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# Thank you!

- Unlocked lock: [https://encrypted-tbn0.gstatic.com/images?q=tbn:ANd9GcTMFYn3IEGaloG-UdL02o1IOiN676x1bCLuQz\\_r7Ykcg8uBQRDY](https://encrypted-tbn0.gstatic.com/images?q=tbn:ANd9GcTMFYn3IEGaloG-UdL02o1IOiN676x1bCLuQz_r7Ykcg8uBQRDY)
- Locked lock: <http://pixabay.com/en/photos/security%20lock/>